The following steps must be followed each time a user does a 'Person Search' from the Main Menu page in Oregon ACCESS. Searching in Oregon ACCESS utilizes the Client Index (CI) database. The CI database is the Department's official person registry and contains more client records than the Oregon ACCESS database. If the person is not found in CI, the user will then be able to search the full Oregon ACCESS database.

These steps are required in order to reduce the number of duplicate person records that are created. A new record should only be created after performing a complete search.

When searching, use the following steps:

- When searching by SSN, if the SSN is found, check to be sure it is the correct person;

- When searching by name, use the first three letters of the first name and the first three letters of the last name (i.e. BEC, JOH). This will display a list of potential matches, even if the name is misspelled;

- If the person is not in the list, try using the date of birth (DOB) in addition to the name as described above;

- If the person is found, but has incorrect information, such as a misspelled name, incorrect SSN, or incorrect DOB, do not create a new record. The incorrect information can be corrected much easier and faster than merging duplicate records;

- If the person is not found, click 'No Match -> Search in OA' to search in Oregon ACCESS.

- The 'Search Status' field indicates which system the currently displayed results are from. This will display as:
    - o 'CI' when CI results are displayed;
    - o 'OA' when OA records are displayed; and,
    - o 'Idle' when the search has not been initiated.

- If the person is still not found, create a new record.

Person search scenarios with a description of how Oregon ACCESS will route users:

- Search scenario #1: Person is found in CI and there is a registered Oregon ACCESS record associated to the CI person.
- Search scenario #2: Person is found in CI, but there is no registered Oregon ACCESS record associated to the CI record.
- Search scenario #3: Person is not found in CI.

Search Scenario #1: Person is found in CI and there is a registered Oregon ACCESS record associated to the CI person. *(This means that there is an Oregon ACCESS record that has the same CI number as the CI record you selected. This connection is made during the Oregon ACCESS registration process).*

In this scenario, the button will be enabled when users click on the person on the search return screen. The availability of this button indicates that there is a registered Oregon ACCESS record associated with the highlighted CI record.

When the user clicks on the [View Person] button, they will be taken to the Person Details window for this person. If the user would like to return to the search results window, they may click on the [Person Search] button in the Person Details window.

Search Scenario #2: Person is found in CI, but there is no registered Oregon ACCESS record associated to the CI record.

In this scenario, after users click on the person in the search return list, the user may download the CI record to Oregon ACCESS by clicking on the [Download/Reg from CI] button.

When the user clicks on the [Download/Reg from CI] button from the CI search results window, the system will perform a search of the Oregon ACCESS database, using the same search criteria that was entered to initiate the CI search.

If a match is found among the OA search results, the user may view the record by clicking
View Person. At that point, the user may register/re-register, as necessary. If no match is
found among the Oregon ACCESS search results, the user may click
No Match -> Download and continue with the download process. If the user
would like to search again, using different criteria, they may click the **Clear** button,
enter the new search criteria, and search again.

Search Scenario #3: Person is not found in CI.

In this scenario, the user has performed a CI search, but does not find a record that matches
the consumer's data.

The user may click on [No Match -> Search in OA]. The system will perform a search of the Oregon ACCESS database, using the same search criteria that was entered to initiate the CI search.

If the record is found in the OA search results, the user may click View Person to go to the Person Details Window. At that point, the user may register/re-register, as necessary.

If the person is not found in the Oregon ACCESS search results, the user may click the Not Found in OA -> Create Person button and create an Oregon ACCESS record.

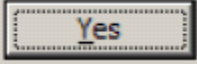**CIS Registration Triggers**

Oregon ACCESS 'forces' a CI Search when particular actions are taken. Users are navigated to a CI search in the following instances:
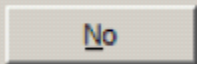
- When a user add a SSN to a person record.
- When the user attempts to enter the CA/PS system and the consumer is unregistered.
- When a user attempts to perform CMS integration and the consumer is unregistered.
- When a user changes the 'Applying For' status for the MED benefit to PA or Applying, and the consumer is unregistered.
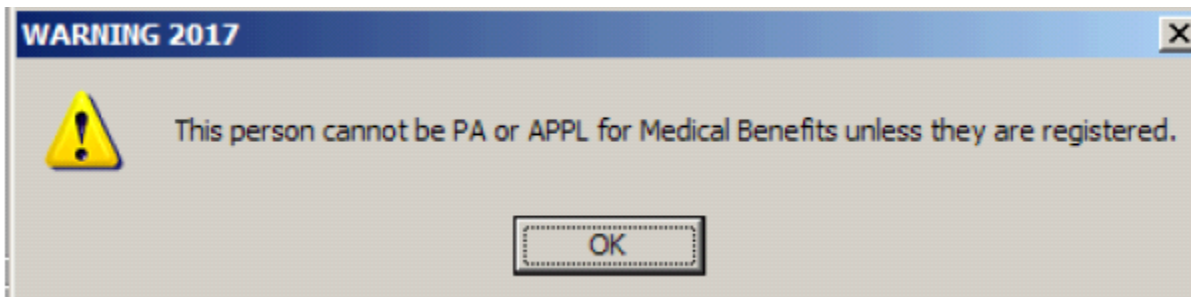
When the above actions are taken, Oregon ACCESS will return a message asking the user if they would like to register the consumer.
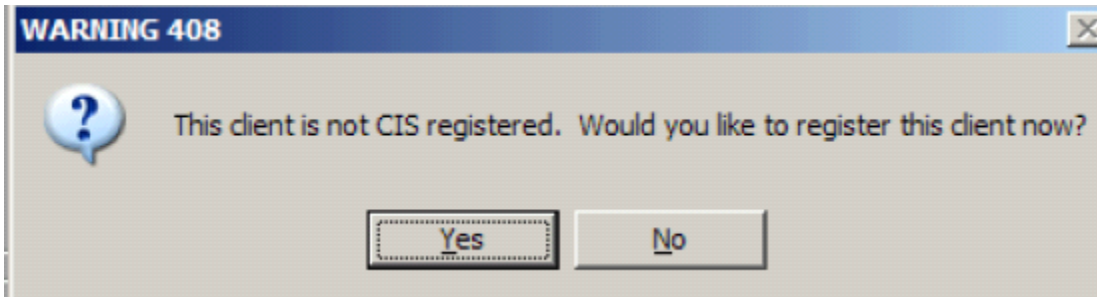
If the user selects [Yes] they will be navigated to the Registration screen.

If the user selects [No] they will receive a second message informing them that the action cannot be completed.

Synchronization Screens

Since the Mainframe (CI) and Oregon ACCESS include two different databases that can be updated and edited individually, this can result in a mismatch of information between the two systems. In order to ensure that the person data in Oregon ACCESS is synchronized with the person data on the mainframe, the synchronization screen will be launched within the Oregon ACCESS application. This screen will display automatically if a mismatch of information is found between the Mainframe record (CI) and the Oregon ACCESS record for the same person.

	ACCESS		CIS		Verification
Last Name:	SPD		SPD		Report Other
First Name:	NINER	☐	NINE	☐	
MI:		☐	M	☐	
DOB:	04/16/1915	☐	05/01/1950	☐	Report Other
SSN:	- -		- -		
DOD:	01/09/2007	☐	00/00/0000	☐	
Sex:	Male		Male		
Race:	White	☐	Black or African Americ	☐	
Ethnicity:	Not - Hispanic	☐	Hispanic or La	☐	

To resolve discrepancies, the user would check the box(es) next to the accurate consumer information, select a Verification type and method, then click the Synchronize button at the bottom of the screen. This will ensure that same information displays in CI as displays in Oregon ACCESS.